- Our contract has used product FIXED_AMT_MS1_CONT as its contract line. This defaults one Date type milestone & event onto the billing plan. The event defaults to "Ready" status.

- The user needs to change the Event Status back to "Pending" in order to edit the event. They need to identify the Event Date & the Percentage (i.e. the % of the Total Amount $ this event bills for).
- After entering the Percentage, click the "Calculate Amount" button to auto-populate the Amount field on the event line

- Set the Event Status back to Ready. In Ready status, once the associated milestone is marked as "Completed", milestone processing has ran & the Event date has occurred, billing will process against this contract for $2,000.

- To change the event milestone to complete, navigate back to the contract General Information page & click the Milestones link at the bottom

- This shows you all milestones currently associated with the contract. The "1 – Date Type Milestone" line is your actual milestone. The "Date Type Milestone" bullet indented underneath is the milestone condition that must be met in order for the milestone to be considered complete. This milestone defaults to Ready status, but we still need to indicate when the condition was met.

- Click the milestone condition link:

- Enter a date in the "Completion Date" field and click Save

- Now, if billing were processed on this contract, since the milestone associated with Event 1 on your bill plan is complete & the Event Status is set to ready, the contract will process billing for the amount on Event line 1 of the bill plan ($2,000)

- Now, we want to add a 2nd billing event with a milestone to capture the other 50% of the total contract amount. Click the Add Milestone icon.

- Choose your Milestone Template – for this example, we will choose DATE

- Click Save to add the milestone to the contract. Then, click the Return to General Information link.

- Click the Billing Plans link

- Click the B101 link to enter the billing plan

- Navigate to the Events tab & click the '+' icon to add a second event to the contract

- Change the Event Type from the default of "Date" to "Milestone"

SMART

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| Billing Plan General | Billing Plan Lines | **Events** | Tax Parameters | History |

Contract:	MILESTONE_TEST		BI Unit:	03400
Sold To Customer:	DHHS	US Dept of Health & Human Svcs	Bill To:	DHHS	US Dept of Health & Human Svcs
Billing Plan:	B101	Milestone Contract Based	Currency:	USD

Define Events

⦿ Percent   [Calculate Amount]
◯ Amount

Add Milestone

Amount Detail

Total Amount: 4,000.00

Remaining Percent: 50.00000000

Remaining Amount: 2,000.00

Event Detail

Customize | Find | ⊞   First ◀ 1-2 of 2

Event	Event Type	*Event Status	Event Date	Milestone Origin	Milestone Number		Contract Milestone Status	Days Lag	Milestone Completion Date		Percentage	Amount
1	Milestone	Ready ▾	02/09/2010	Contract	1	Date Type Milestone	Ready			Event Note	50.00000000	2,000.00
2	Date ▾	Pending ▾	02/09/2010 📅							Event Note		0.00

Date
Milestone

Return to ⃝ Plan

[Save] [Return to Search] [Notify]   [Ac...

Billing Plan General | Billing Plan Lines | Events | Tax Parameters | History

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- By choosing an event type of Milestone, you have activated additional event fields where you select the Milestone Number associated with the event. Milestone Number pulls from the milestones defined on the Milestone page shown in earlier screenshot. The Date type milestone we manually added is #2.

- Click the look-up icon to select Milestone Number 2. Complete the Percentage field to allocate the remaining 50% of the Total Amount to the second event. Click the "Calculate Amount" button to auto-populate the Amount field.

- Set the Event to Ready & Save.
- (Note: The Milestone Completion Date field will not default until Milestone Processing is run)

- Now we need to mark our second Milestone as Completed. Navigate back to the contract General Information page & click the Milestones link at the bottom.

- (Note: Our second milestone is still in "Pending" status since the bullet is not filled in)

- First, click on the milestone itself to set it to Ready. Click the "2 – Date Milestone" link.

- Next, click the milestone condition for your second milestone (the indented bullet point) & enter a Completion Date. Click Save.

- Now, if you look at your Billing Plan Events tab, you will see that both Events have a Contract Milestone Status of "Ready" & an Event Status of "Ready."
- This means that when Milestone Processing is run, both milestones will be picked up & recognized as Complete. Then, when billing is run, the Amount associated with each event line will be picked up & billed for.